

Bankit Intelligence Import and Export

When deciding what type of import to use for banking intelligence, it is based on the following:

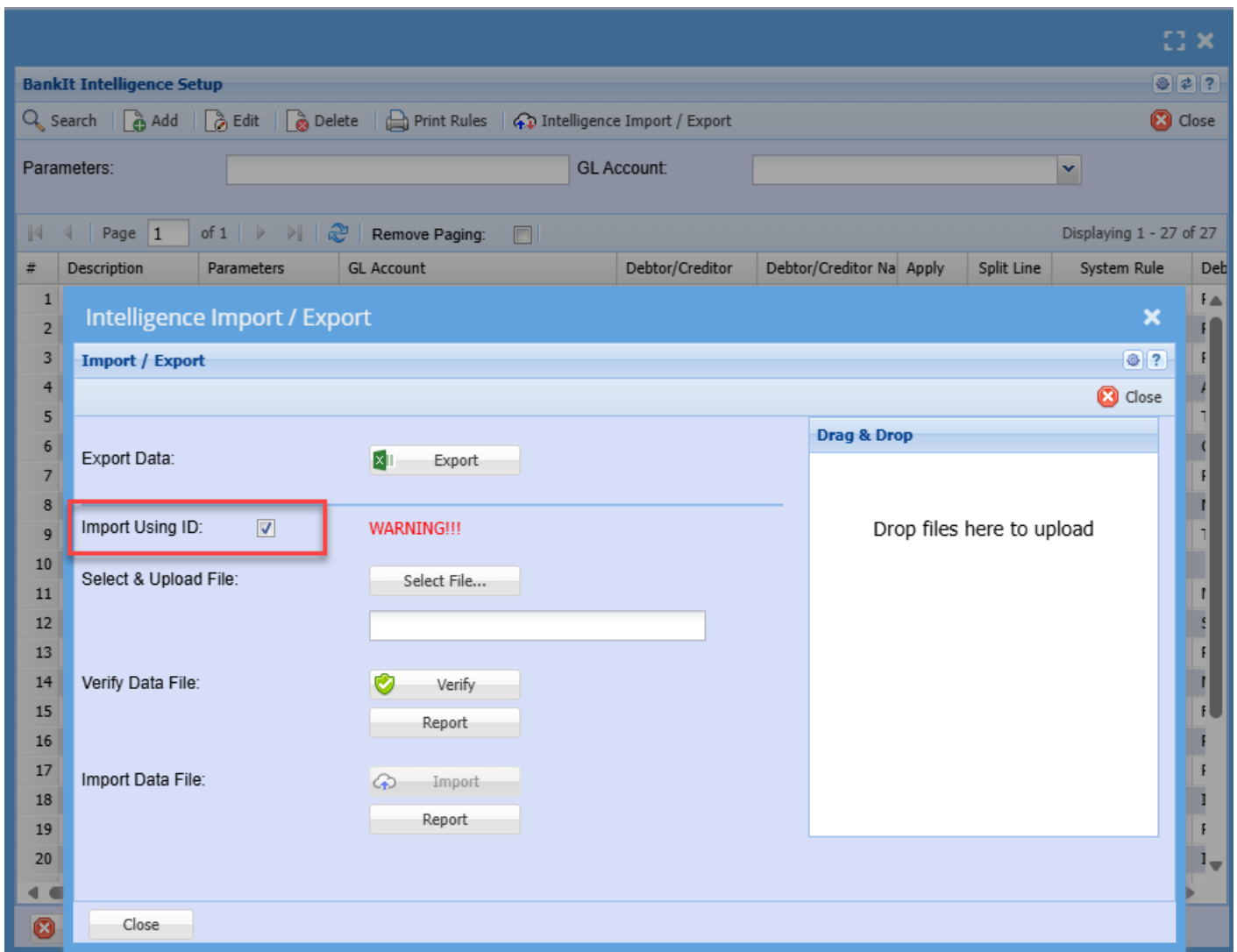
1. Maintaining current rules and fixing
2. Creating new rules and importing

Maintain Bankit intelligence rules by exporting and fixing and importing back.

Maintaining current rules and fixing

Use the tick for export and import using ID

This is used so that you can change information on existing intelligence, so when importing the system knows what rule to update.



Excel export with ID field

Maintain structure of the Excel sheet and keep the id field in the first column.

Change the information required and save your excel sheet.

When importing and using the id structure, tick the import using ID box

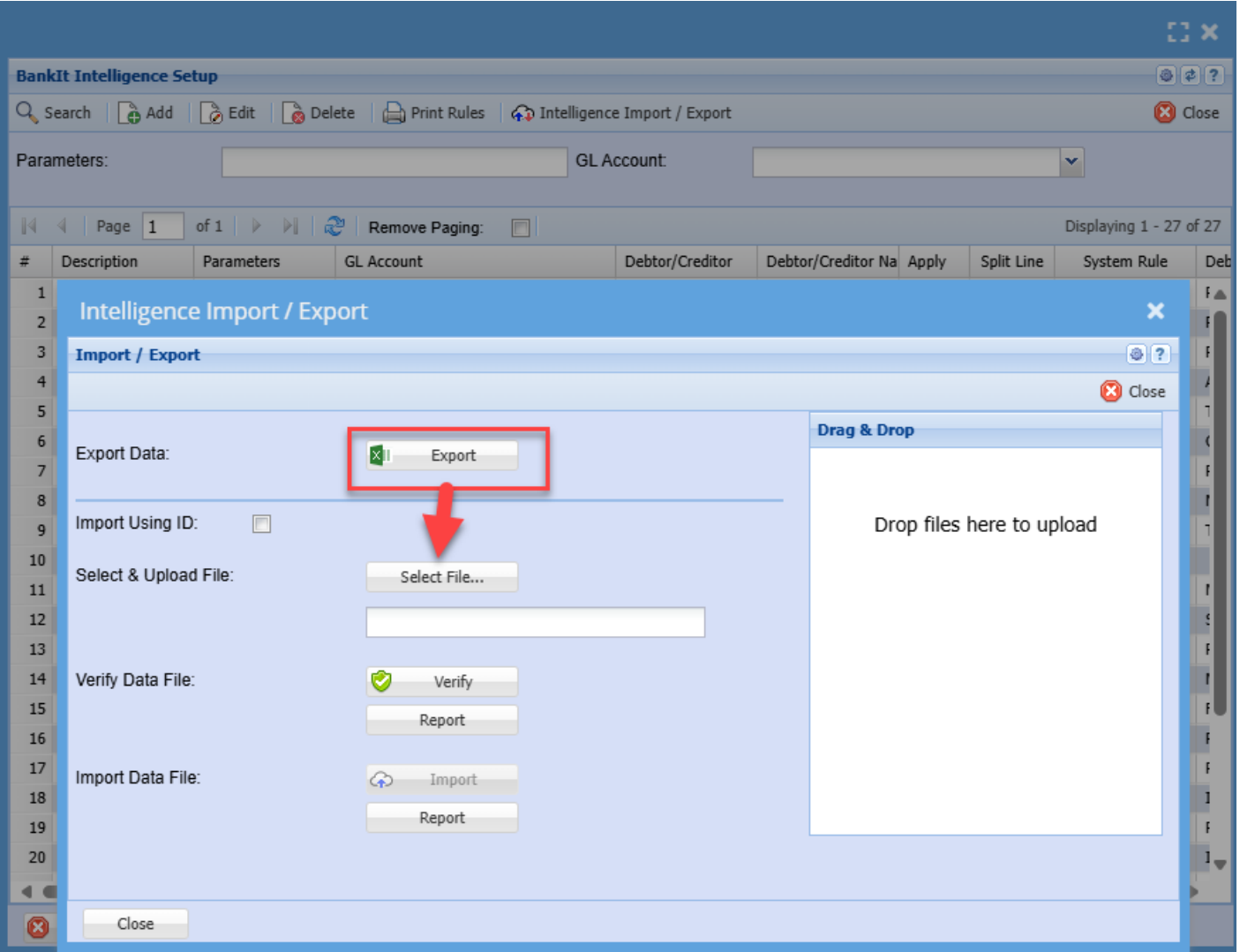
	A	B	C	D	E	F	G	H	I	J
1	ID	Rule Type	Paramete	GL Account	Debit Des	Credit Des	Region Se	Region	Division S	Divisic
2	1	Test All De	All	1-1600	Payment	Payment	UseDefaults		UseDefaults	
3	2	Test All Cr	All	2-1600	Payment	Payment	UseDefaults		UseDefaults	
4	3	Test In Lin	NETCASH	1-1050	Payment	Payment	UseDefaults		UseDefaults	
5	4	Test In Lin	IMAGEBU	6-1400	Adverts	Adverts	NoAction		NoAction	
6	5	Test In Lin	Thorburn	6-5800	Telkom		Apply	GAU	NoAction	
7	6	Test In Lin	Greystone	6-1200	Greystone		NoAction		NoAction	
8	7	Test In Lin	Services F	6-1600	Payment	Payment	NoAction		NoAction	
9	8	Test In Lin	Nedlink	1-1600	Nedlink	Nedlink	NoAction		NoAction	
10	9	Test In Lin	Telkom	6-5800	Telkom	Telkom	NoAction		NoAction	
11	10	Test In Lin	ECN	1000/3000			NoAction		NoAction	
12	11	Test In Lin	WESBANK	9-8150	Motor Fin	Motor Fin	NoAction		NoAction	
13	12	Test In Lin	Service fe	6-1600	Service fe	Service fe	NoAction		NoAction	
14	13	Test In Lin	RENT TO F	6-5000	Rent Paid	Rent Paid	NoAction		NoAction	
15	18	Test In Lin	OT512564	4770/2000	Monthly I	Monthly I	Apply	GAU	Apply	Admin
16	19	Test In Lin	SHELL RO	1-1600	Fuel Acco	Fuel Acco	NoAction		NoAction	

Creating new rules and importing

When creating new rules, one does not use the ID tick box.

There should be no other rules in here except the ones you want to create as new rules.

When exporting you are only getting the headers so that you know the structure for the import.



Here is a list of the Rule Types

These need to be exact wording to link to the rule type

Attached is an example of the exported intelligence

Test In Line for words or phrase
Test First X characters and what to search for
Compare Words in line - Test accuracy and weight %
Test In Line for words or phrase